



Forrester Boyd

CHARTERED ACCOUNTANTS

Client  
Care Code



# Personal service



## Lasting relationships

Our aim is to build strong, lasting partnerships based on trust, clarity and genuine understanding.

Trusted  
independent  
advice



For more than ninety  
years we have supported  
clients across  
Lincolnshire, Yorkshire  
and beyond.

This client care code sets out the standards you can expect from us and the shared responsibilities that make our relationships work. It reflects our Mission, our Vision, and our EPIC Values. It also reflects the professional standards we uphold as members of the ICAEW.

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# Our Commitment

We want you to feel informed, supported and valued every time you work with us. You can expect a relationship rooted in professionalism, accuracy and care. To make your experience straightforward and consistent, we commit to:

- Taking time to understand your circumstances, your goals and your ambitions
- Communicating clearly and responding within a reasonable timeframe
- Keeping you updated as work progresses
- Providing advice that is accurate and grounded in strong technical expertise





## to you

- Ensuring you always know who to contact when you need help
- Delivering work with attention, diligence and professionalism
- Acting in your best interests and being open in our guidance

These commitments are supported by our Service Standards and brought to life through our EPIC Values which guide how we work each day.



# Our Service Standards

We want your experience to be reliable, clear and professionally managed. To support this, we follow firm-wide service standards.

## Response Times

We aim to:

- respond to emails within two working days and let you know if a full response requires more time. If something is urgent, we encourage you to call so your query can be directed to someone who is available to assist.
- ensure an out of office response provides you with a return-to-work date and another point of contact should you need it.
- answer calls within 5 rings and these will be returned on the same day where possible.
- ensure your wait in reception (if pre-arranged) does not exceed your appointment time and you are advised if there is a delay.
- respond to you in the manner in which you wish to be communicated with and if by mail, will do so just as promptly.

## Quality of Work

Your affairs are handled with care, accuracy and diligence and within an agreed timescale. Our advice is based on strong technical grounding, thoughtful preparation and the high standards expected of a professional practice.



## Communication

We keep you updated as work progresses and confirm important discussions and next steps in writing. You will always know your main contacts and how to reach the team responsible for your affairs.

## Confidentiality & Data Security

Your information is treated with strict confidentiality and processed in line with professional, ethical and regulatory requirements. We maintain secure systems and controlled processes to safeguard your data.





## Your Feedback Matters

We welcome feedback of any kind. It helps us improve and ensures we remain aligned with your expectations. If you have a concern, please speak with your partner contact in the first instance so we can resolve it quickly. If the matter remains unresolved, you can escalate it to our Chairman who will review the issue fairly and promptly.

## Our Promise

We are proud to work with clients who value integrity, respect, proactive thinking and collaboration. This code reflects our commitment to delivering dependable service, thoughtful advice and long-lasting relationships built on trust. Your success matters to us. We look forward to supporting you for many years to come.

# Our Mission



As trusted advisors, we deliver tailored expertise with local insight and a truly personal service, helping our clients and communities thrive.

# Our Vision



To build lasting relationships with our clients by providing expert advice, empowering our people, sharing knowledge and delivering innovative solutions that drive client success.

# Our EPIC Values



## **Everybody counts**

We value and respect every individual, ensuring our colleagues, clients and communities are supported and long-lasting relationships are built.

## **Pro-active**

We anticipate needs, act with initiative, and innovate to ensure optimal outcomes for our clients.

## **Integrity**

We act with honesty and transparency, building trust and confidence in everything we do.

## **Collaborative**

We work as one team, sharing knowledge and supporting one another to deliver the best outcomes for our clients and colleagues.

# Our EPIC values in action

Our EPIC values shape how we work with you and the experience that you receive. Each value sets out what you can expect from us and what we ask in return to help our partnership thrive.

## EVERYBODY COUNTS

### What we do

We treat every client, colleague and partner with respect, dignity and genuine care. You will be greeted promptly and professionally, your meetings will be handled with discretion and you will always know who is responsible for your affairs. We value long-term relationships built on trust and mutual respect.

### What we ask of you

We kindly ask that our team is treated with the same courtesy and professionalism that we extend to you. We provide a safe and respectful working environment and we know this is something our clients value as well. In situations where behaviour falls short of this, we may need to discuss the future of the relationship.

## PRO-ACTIVE

### What we do

We aim to stay ahead by anticipating your needs, taking responsibility for deadlines and sharing relevant insights. You will receive updates as work progresses, and we will ensure you understand your position and your options.

### What we ask of you

We ask that you share information with us in a timely and accurate way so we can give you the best advice when you need it. If you ever feel we're not fully meeting the commitments in this code, please let us know. Early conversations help us put things right quickly and keep everything running smoothly for you.

## INTEGRITY

### What we do

We act with honesty, openness and professionalism in everything we do. Your information is handled securely and confidentially, and we document key decisions and next steps clearly. If you raise a concern, it will receive prompt and personal attention. Our advice will always reflect our best judgement and your best interests.

### What we ask of you

We ask that you keep us informed about your circumstances and let us know about anything that may affect your affairs. When you share information openly, we can give you accurate advice that supports your goals. If something doesn't feel quite right, please tell us so we can address it quickly and maintain the trust that sits at the heart of our relationship.

## COLLABORATIVE

### What we do

We work alongside you, not simply for you. You will have direct access to your partner and the team supporting you. We welcome your feedback, ideas and questions and we draw on the expertise of our wider firm and our UK200Group network to strengthen the service we provide. We believe collaboration leads to better outcomes and deeper relationships. We aim for success together.

### What we ask of you

We ask that you involve us in your plans and keep us updated with your ideas and any concerns you may have. When you see us as part of your team, we can understand your situation more clearly and shape our advice around what matters most to you. This open approach helps us work better together and achieve stronger results.





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Forrester Boyd is a partnership operated from offices in Grimsby, Scunthorpe, Louth, Skegness, Beverley, Lincoln and Leeds.

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